

Cadw Shoulder Season Survey

Autumn 2024

Publication date: 3 April 2025

Social research number: 32/2025



Cadw Shoulder Season Visitor Survey
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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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This document is also available in Welsh.

ISBN: 978-1-83715-387-9

3 April 2025

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1. Headline findings

Very high satisfaction across all sites

Nearly all (90%) visitors 'strongly agree' that their 'overall experience is/was good'. Most (77%) 'strongly agree' that the site is 'good value for money'. This high level of satisfaction is consistent across all sites.

Exceeding many expectations

About half (51%) of autumn visitors describe their experience as 'better than expected', and nearly all of the remainder (48%) describe it as 'as expected'. All sites perform very well against expectations.

'I thought it would just be a ruin'

Common reasons given for the experience exceeding expectations include the castle or abbey being much bigger than expected, visitors can access more parts than expected (especially climbing up walls and towers), and it is surprisingly well preserved and intact. Some even say they thought it was just going to be a ruin. Cadw's marketing may need to be refocused to address such perceptions.

Who is visiting in the autumn?

24% of autumn visitors come from Wales, 61% from the UK outside Wales and 15% from overseas. These proportions do not vary significantly by timing of visit (half term holiday / term time weekend / term time weekday), and perhaps one of the most surprising research findings is that this broad geographical profile does not differ significantly from peak summer season either.

Autumn attracts a higher proportion (19%) of 25 to 34s compared to summer. They are more likely to visit during term time.

Autumn also attracts a higher proportion (12%) of DEs than in summer (7%). They are more likely to visit on term time weekdays.

The peak summer season attracts a higher proportion (27%) of children compared to autumn term time (15%), although if summer is compared to autumn half term, the difference is not significant.

Why do they visit in the autumn?

The weather may be different in the autumn, but the motivation for visiting a Cadw site does not tend to differ significantly from the summer. 'Interest in castles / historic sites' remains the dominant motivation, cited by 58% as the main reason for visiting.

12% say they 'chose this time of year as it's quieter', although only 2% cite this as their main motivation.

Interest in a Cadw site app

Views on a Cadw site app are divided, but nevertheless, 47% say they would consider using one.

Among those interested, there are numerous features which could be of interest, including an audio guide (64%), free content that explains the site (61%), map and directions of how to get to other Cadw sites (52%) and event calendars (46%).

Tours would make the visit better

The top three suggested improvements to the visitor experience are all related to tours: an audio tour (26%), a guided tour by a person (21%) and digital tours on own device (17%).

Interpretation is appreciated

If a visit disappoints, lack of detailed information is the most common reason, but where interpretation is provided in its various forms: audio guides, written information, videos and decorative installations, these all help to bring the site to life.

2. Background and method

Why has this research been commissioned?

Cadw wished to understand the profile of its autumn shoulder season visitors and their experience at eight busier sites in order to inform future marketing and product development. Cadw last conducted a face-to-face shoulder season visitor survey in spring 2018. The most recent face-to-face visitor survey in any season was in summer (peak season) 2022. This report makes comparisons with the previous surveys where questions are the same and differences are significant.

Cadw commissioned Strategic Research and Insight (SRI), an independent Cardiff-based research agency, to conduct the research on its behalf.

How has the research been conducted?

1,179 interviews have been conducted with visitors to eight Cadw sites between 19 October and 6 December 2024 using a questionnaire based partly on previous Cadw surveys and updated to reflect pertinent information needed now. Nearly all (1,172) interviews have been conducted at the site during the visit. The remaining 7 interviews have been conducted post-visit by telephone with visitors not wishing to answer questions during their visit but consenting to post-visit follow-up.

Table 1: Sample structure by site

Site	No. of interviews
Conwy	252
Caernarfon	226
Harlech	145
Chepstow	125
Tintern	121
Beaumaris	111
Castell Coch	108
Raglan	91
Total	1,179

Throughout the report, differences between sites and demographic groups are highlighted where statistically significant.

3. Purpose of visit and demographics

Autumn 2024 visitor profile

Table 2: Demographic profile of Autumn visitors

Profile	Overall	Half term holiday	Term time weekends	Term time weekdays
Age				
0 to 7	6%	9% ¹	7% ¹	3% ²
8 to 15	12%	15% ¹	6% ²	13% ¹
16 to 24	8%	7%	11%	7%
25 to 34	19%	12% ²	24% ¹	21% ¹
35 to 44	16%	19% ¹	21% ¹	9% ²
45 to 54	12%	15%	10%	11%
55 to 64	14%	11%	12%	19% ¹
65+	13%	12%	9%	17% ¹
Base:	1,179	400	365	414
SEG				
AB	43%	48%	45%	37% ²
C1	30%	29%	30%	31%
C2	15%	17%	13%	15%
DE	12%	6%	12%	17% ¹
Base:	1,054	367	346	341
Where resident				
Wales	24%	23%	24%	26%
UK outside Wales	61%	66% ¹	61%	54% ²
Overseas	15%	11% ²	15%	20% ¹
Base:	1,179	400	365	414
Ethnicity				
White	94%	96%	92%	95%
Other	6%	4%	8%	5%
Base:	1,167	393	362	412

'Half term holiday' here is defined as Saturday 26th October to Sunday 3rd November inclusive. This was a school holiday week in Wales and in most key geographical markets in England, although Manchester was a notable exception this year. 1. Figures shown stand out as particularly high. 2. Figures shown stand out as particularly low.

Different child profile by timing

During half term, 24% of visitors are children under 16. This compares to 16% on term time weekdays and 13% during term time weekends.

Differences in adult profiles by timing

During half term, the 25 to 34 age group is not well represented (12%) compared to outside of half term (22%).

On term time weekdays, over 55s are much better represented (36%) than during half term (23%) or during term time weekends (21%).

Differences in SEG

Cadw has faced a long term challenge of attracting more of the lower socio-economic groups to its sites. It does however manage to attract 17% DEs on term time weekdays.

Differences in residence

The half term holiday sees the highest proportion (66%) of UK outside Wales visitors, but the proportion of overseas visitors (11%) is lower than during term time.

Table 3: Comparison of demographics to previous years

Profile	2024 shoulder season	2022 peak season	2018 shoulder season
Age			
0 to 7	6% ²	10%	2018 shoulder season figures for age are not comparable
8 to 15	12% ²	17%	
16 to 24	8%	8%	
25 to 34	19% ¹	10%	
35 to 44	16%	17%	
45 to 54	12%	14%	
55 to 64	14%	11%	
65+	13%	13%	
Base:	1,179	2,040	
SEG			
AB	43%	46%	44%
C1	30%	33%	37%
C2	15%	14%	13%
DE	12% ¹	7%	6%
Base:	1,054	2,001	1,474
Where resident			
Wales	24%	22%	33%
UK outside Wales	61%	63%	54%
Overseas	15%	15%	13%
Base:	1,179	2,048	1,495
Ethnicity			
White	94%	97%	95%
Other	6%	3%	5%
Base:	1,167	2,039	1,493

Percentages have been re-based to exclude respondents refusing to answer. The age profile from the 2018 shoulder season is not comparable with the other surveys because age was only asked of the person completing the survey, rather than all members of their party. 1. Figures shown stand out as particularly high. 2. Figures shown stand out as particularly low.

No significant differences in broad geographical origin

24% of autumn visitors come from Wales, 61% from the UK outside Wales and 15% from overseas. Perhaps one of the most surprising research findings is that this broad geographical profile does not differ significantly from peak summer season.

Some differences in age profile

The peak summer season attracts a higher proportion (27%) of children compared to autumn term time (15%), although if summer is compared to autumn half term, the difference is not significant.

Autumn attracts a higher proportion (19%) of 25 to 34s compared to summer. As discussed, they are more likely to visit during term time.

Autumn attracts a higher proportion (12%) of DEs than in summer (7%). They are more likely to visit on term time weekdays.

Table 4: Comparison of visitors to census data

Profile	Cadw shoulder season visitor sample 2024: England and Wales visitors	England and Wales population: census data
Age		
0 to 7	7%	9%
8 to 15	13%	10%
16 to 24	8%	10%
25 to 34	17% ¹	13%
35 to 44	17% ¹	13%
45 to 54	12%	13%
55 to 64	14%	13%
65+	12% ²	19%
Base:	999	59,597,500
Ethnicity		
White	95%	85%
Other	5%	15%
Base:	989	58,381,000

1. Figures shown stand out as particularly high. 2. Figures shown stand out as particularly low.

Age profile

Cadw's visitor profile of children in the autumn is fairly similar to the England & Wales population. 25 to 44s are better represented than the population, but over 65s are under-represented. Later we discuss the impact of accessibility improvements, and where accessibility is lacking, as this can be a significant issue for the over 65s.

Non-white ethnic groups are very under-represented

Non-white ethnic groups make up 15% of the England & Wales population, but only 5% of Cadw's England & Wales autumn visitor profile.

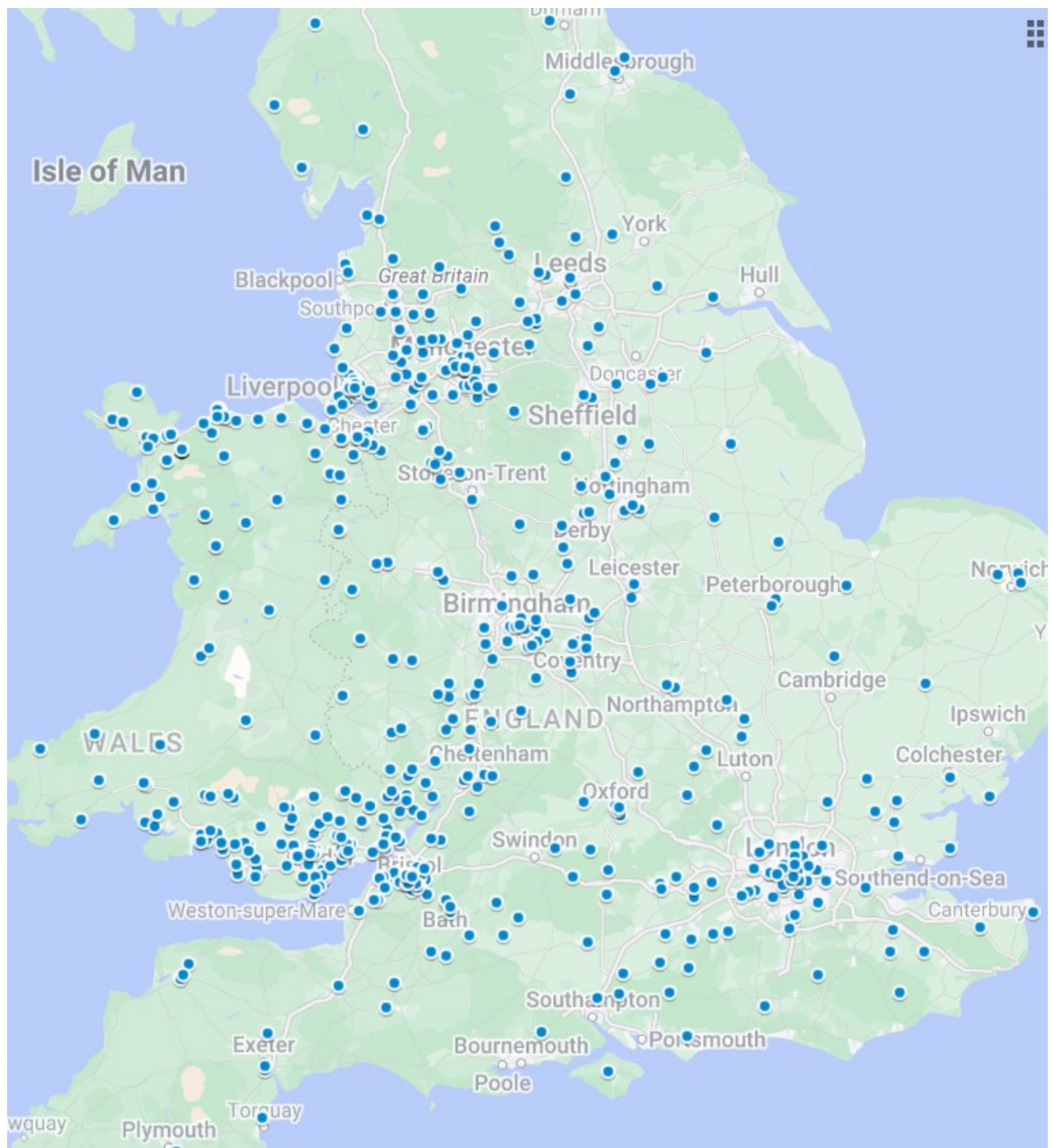
Very strong AB representation, but lack of C2DEs

The Census does not measure socio-economic status in the same way as in our research, and so figures are not directly comparable. However, estimates by segmentation specialists place the 'AB' proportion of the UK population at around a quarter, which makes Cadw's England & Wales profile (41%) well above that. At the same time, the 'C2DE' proportion of the population is estimated at around 40 to 45%, which makes Cadw's profile of this segment (29%) significantly lower, although it is higher than in summer 2022 (21%).

Map of visitor origin (England & Wales): half term



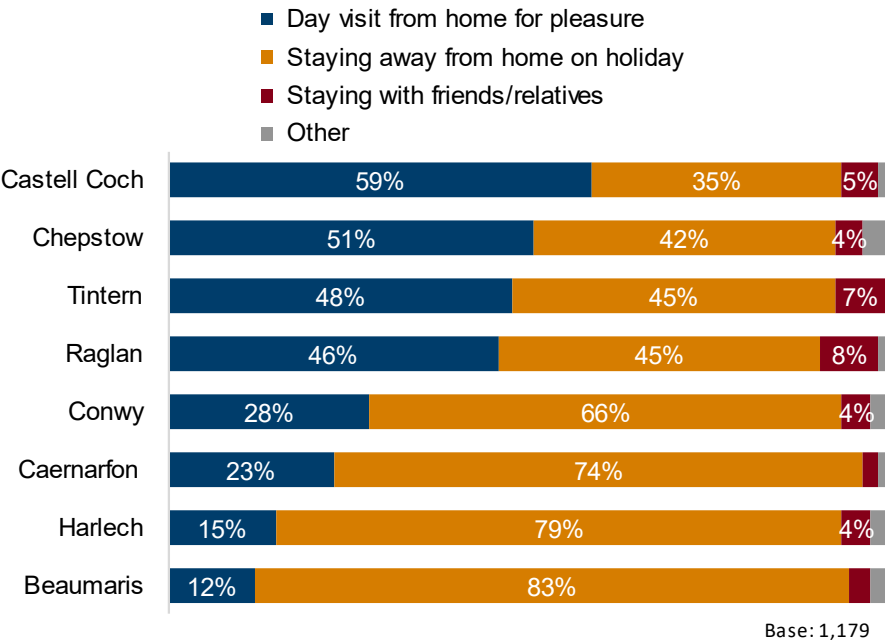
Map of visitor origin (England & Wales): term time (including weekends)



Apart from the fact that there are more term time visitors than half term visitors in the sample, the relative distribution by geographical origin between the two timings of visit does not look significantly different.

Main purpose of visit

Figure 1: Q1 “What is the main purpose of your visit to this town/area today?”



Divide in results between South East (SE) Wales and North West (NW) Wales

Cadw sites in South East Wales attract a balanced mix of visitors on a day trip from home and holidaymakers.

As has been shown in previous Cadw visitor surveys, North West Wales sites, which are in or close to popular holiday destinations, attract the majority of their visits from overnight stays. Their proportion of overnight visitors is not as high as in the summer (when it is typically around 90%), but nevertheless, there are still many holidaymakers around in the autumn.

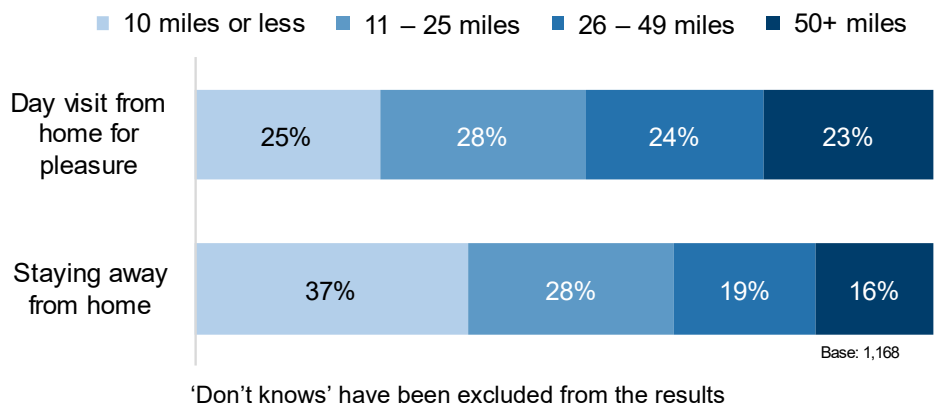
SE Wales sites continue to attract a more balanced mix of day and overnight visitors, as is also the case in the summer.

Differences by timing of visit

There is some difference in results between half term and term time visitors, although in both cases, the majority of visitors are holidaymakers: 67% in half term vs 59% in term time).

Distance travelled on the day

Figure 2: Q5 “From where you stayed last night, how far did you travel today to this site?”



Day trippers from home travel a bit further on average

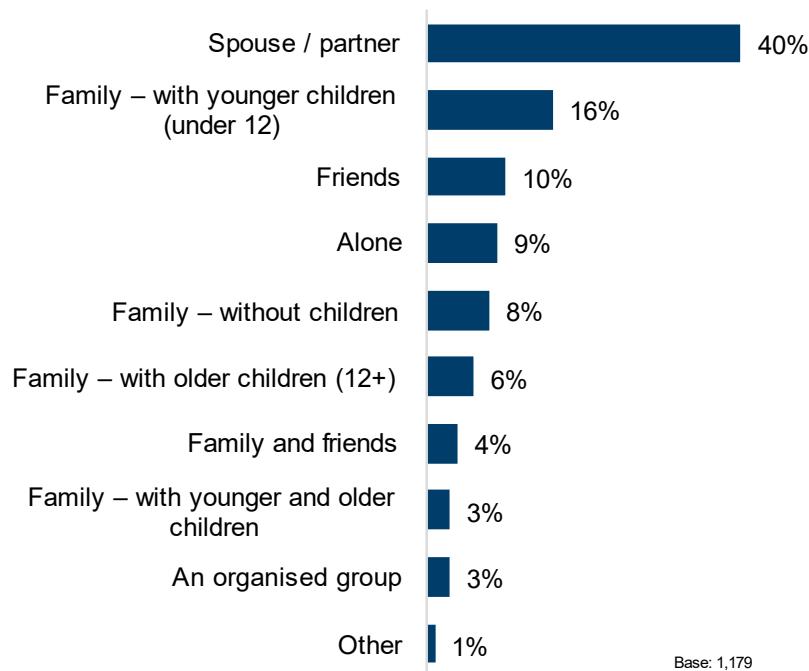
More overnight visitors travel 10 miles or less on the day than day visitors. Some say they see the castle when passing by, or they do an internet search for things to do in the area where they are staying (see also Q11 later).

The highest proportion (56%) of visitors travelling 10 miles or less is found at Castell Coch, which is very close to Cardiff. Beaumaris also has a relatively high proportion (46%) of visitors travelling 10 miles or less on the day. At the other end of the scale, 19% of visitors to Harlech and 24% of visitors to Raglan travel 10 miles or less.

Two in five (40%) half term visitors travel 10 miles or less, compared to a lower proportion (30%) of those visiting outside of half term.

Party type

Figure 3: Q6 “Who are you with today?”



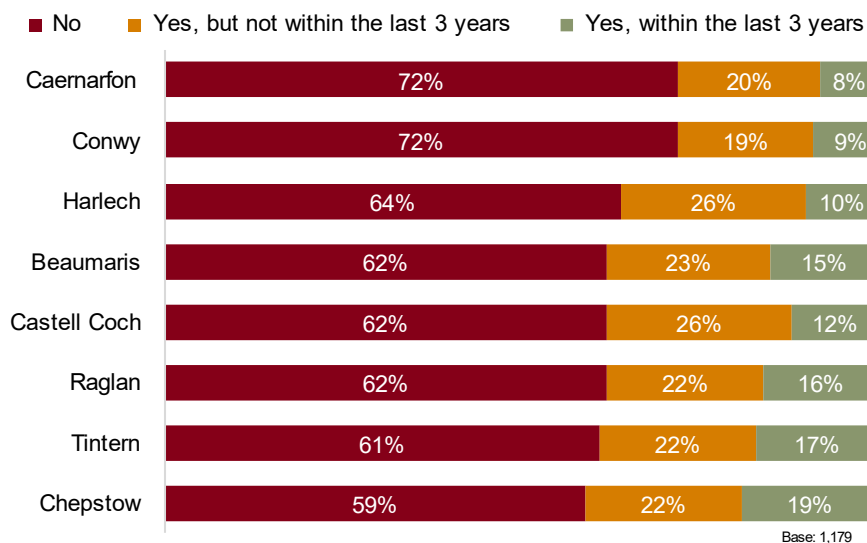
Much lower proportion of families with children in autumn shoulder season

A quarter (25%) of autumn visiting parties include children. This is much lower than in summer (46%). If autumn half term is excluded, 17% of autumn visiting parties include children.

Differences by site are not significant when the timing of interview shifts (in / outside of school half term) is taken into account.

New / lapsed / previous visitors

Figure 4: Q8 “Have you ever visited here before?”



Two thirds new visitors

Two thirds (66%) of visitors in the sample were new to the site at the time of interviewing. This is the same proportion as in the 2022 summer survey. Most of the remainder (22%) had visited before, but not in the last three years, leaving just 12% repeat visitors (within the past three years).

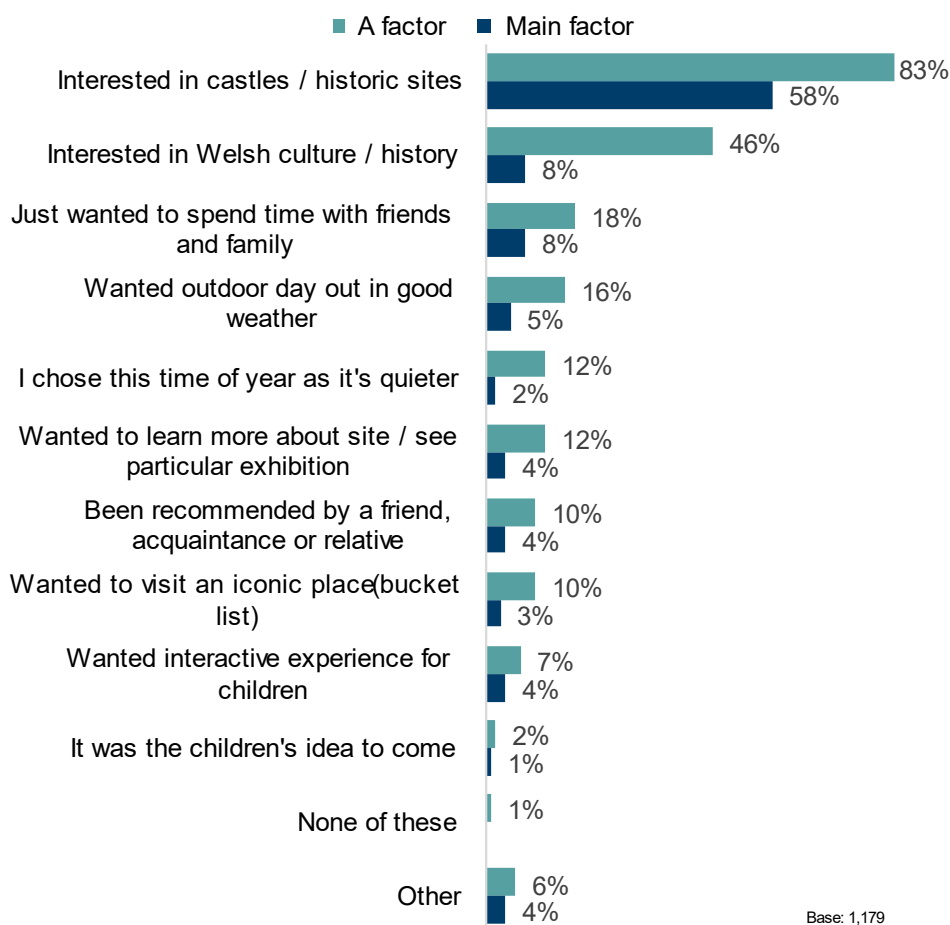
Caernarfon and Conwy both have a high proportion (72%) of new visitors. Both sites are in popular holiday areas.

Visitors from outside Wales are more likely to be new, but not exclusively. 30% of UK visitors (from outside Wales) and 12% of overseas visitors are either repeat (visited within the last three years) or lapsed (not visited within the last three years). The findings in the 2022 summer survey were very similar.

There are no significant differences by half term / term time weekend / term time weekday visitors.

Motivation for visiting

Figure 5: Q9 “Which of these factors would you say influenced your decision to visit today? / And which one was most important ... ?”



Motivation does not differ significantly from the summer

The weather may be different in the autumn, but the motivation for visiting a Cadw site does not tend to differ significantly from the summer. ‘Interest in castles / historic sites’ remains the dominant motivation.

Some (16%) say they wanted a day out in good weather, whereas others sought shelter in the castle to escape the autumn rain.

12% say they ‘chose this time of year as it’s quieter’, although only 2% cite this as their main motivation.

“It’s not heaving with people or screaming kids”
Couple, Midlands, Tintern

“No crowds, you can take your time and take in the atmosphere and quietness to reflect. No Instagrammers.”

Differences by site

There are some significant differences by site. 'Specific interest in castles / historic sites' stands out as the main factor at all sites, but there are some differences by site with other factors:

- 'Interest in Welsh culture / history' stands out more at the castles in North West Wales, where 11% give this as their main motivation, compared to 4% at sites in South East Wales
- Castell Coch stands out as being perceived as 'iconic', with 13% of its visitors citing their main motivation as 'wanted to visit an iconic place'
- Main motivation at Tintern varies more than at other sites, with 'spending time with friends & family' (19%) and 'wanted to learn more about this site' (17%) also being given as the main factor

Differences by timing of visit

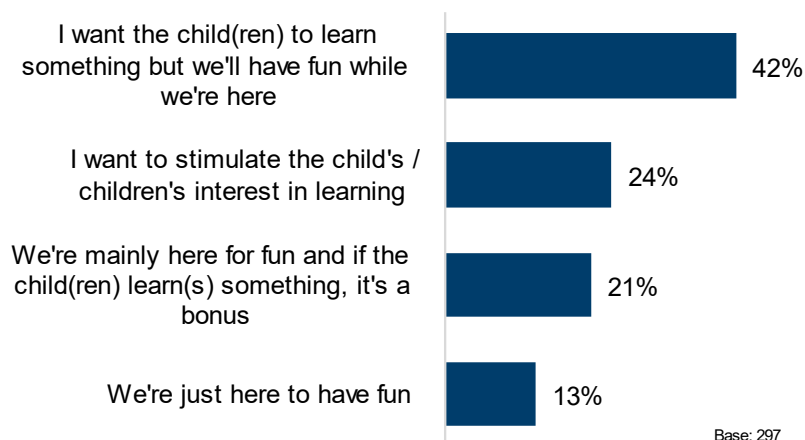
Differences by half term / term time weekend / term time weekday mostly do not vary significantly, although in half term, 7% of visitors with children cite 'wanted interactive experience for children' as their main motivation, compared to 2% of term time visitors.

Differences by visitor origin

'Interest in castles / historic sites' is the main factor for 62% of overseas and 62% of UK visitors, but a lower proportion (46%) of Wales visitors. This is a similar finding to the 2022 summer survey.

Desired experience for children

Figure 6: Q10 (Families with children) "... which of the following best describes the experience you hope to have?"



Q10 has been asked only to families visiting with children

Much more emphasis on learning than in summer

For two thirds (66%) of autumn visitors with children, the emphasis is more on learning than fun. This is much higher than in the 2022 summer survey, which found learning to be the priority for 39% of families.

The sample size is low to compare reliably by individual sites. The timing of the visit does not affect the balance of motivation significantly. Results do not vary significantly by whether the children are older or younger.

"We didn't know what to expect but the children's interactive things were brilliant"

Family with young children, South East England, Chepstow

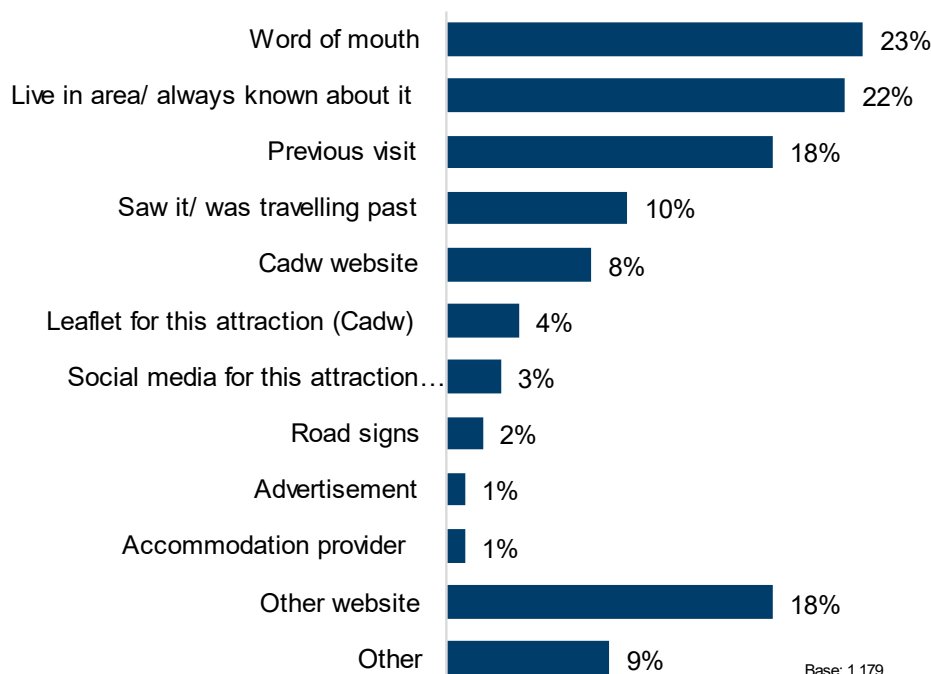
"Usually the kids don't like historic sites but they liked crawling in the sewage tunnel"

Family with young children, London, Tintern

4. Pre-visit awareness and bookings

Sources of awareness

Figure 7: Q11 "Can you tell me how you found out about this attraction before visiting?" (prompted)



Similar findings to previous surveys

As found in previous surveys, only a minority of respondents can name specific sources of marketing such as Cadw leaflets or the website. However, this does not mean that such sources do not play an important role, because awareness through 'word of mouth' and 'previous visits' has to originate from something.

The proportions citing 'Cadw website' are highest at:

- Tintern (20%)
- Beaumaris (14%)

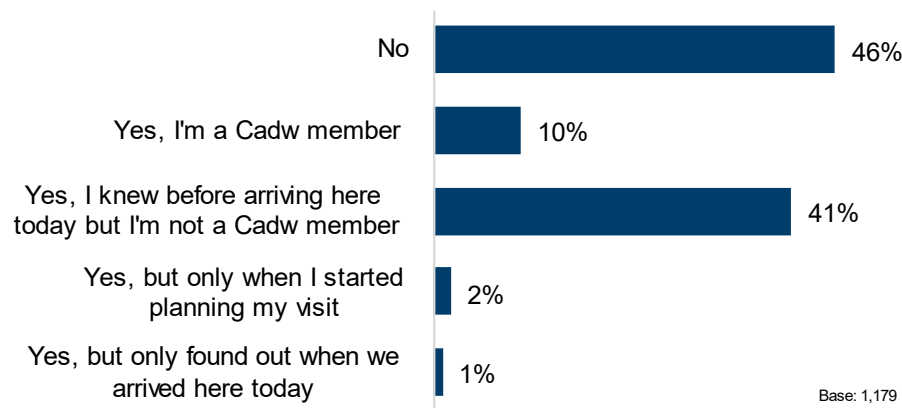
The proportion citing 'Leaflet for this attraction' is highest at Harlech (8%). Harlech also has the highest proportion (6%) answering 'Social media for this attraction'.

'Other website' usually means a Google search. Visitors typically don't recall what site they end up on.

"Googled castles in the area"
Family & friends, South East Wales, Raglan

Awareness of Cadw

Figure 8: Q28 "Had you heard of Cadw before the start of this interview and arriving here today?"



Mostly non-members visiting

10% of visitors in the autumn are Cadw members. This similar to summer 2022 (8%).

There is opportunity to attract more visitors into Cadw membership, as most of those aware of Cadw are not members. This includes around half of repeat visitors to the site of interview.

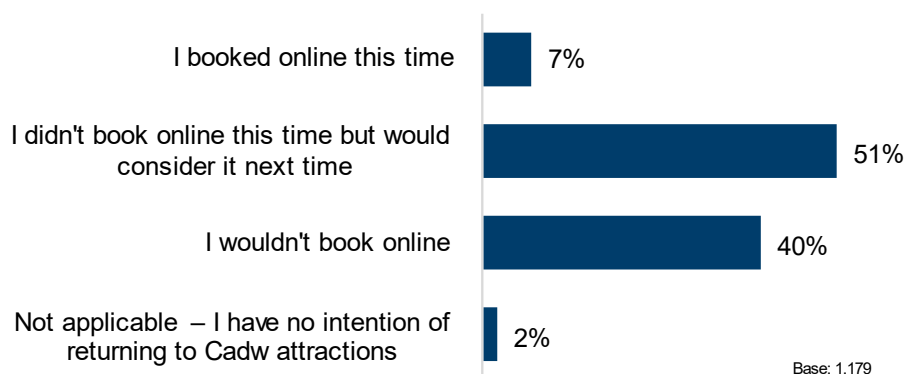
There is also scope for increasing awareness of Cadw, as close to half of visitors had not heard of Cadw prior to the interview. This includes 15% of Welsh residents.

Differences by party type

Cadw membership is highest (16%) among families with young children.

Booking online

Figure 9: Q12 "Did you book online before your visit today, and if not, would you consider doing so if you were to visit a Cadw attraction again?"



Most shoulder season visitors do not currently book online

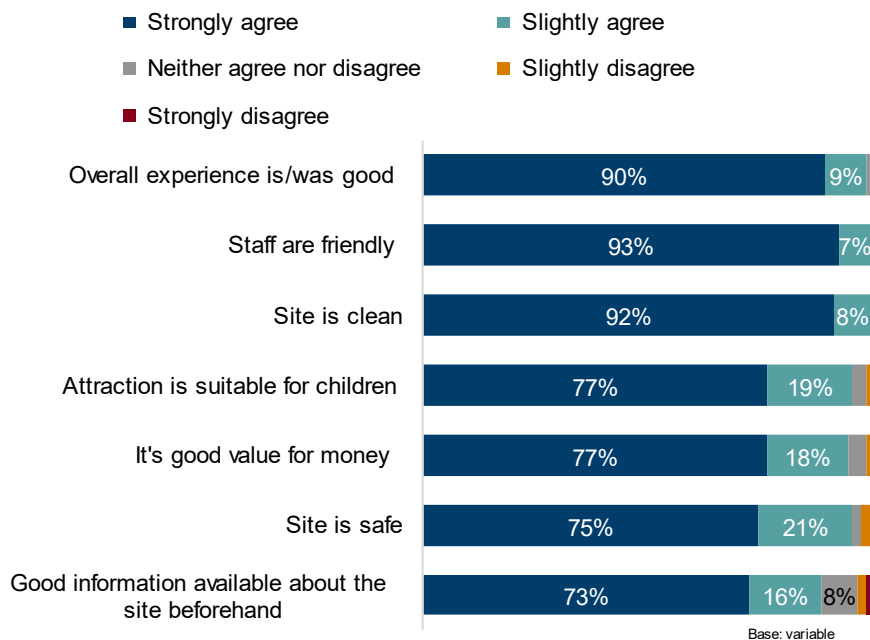
Q12 is a new question. Only a minority (7%) of visitors book online, but many (51%) of the remainder say they would consider it next time.

The proportion booking online is highest at Conwy (12%) and noticeably lower at Harlech (3%), Tintern (3%) and Raglan (2%). Online booking is also higher among families with young children (10%). There is no difference by timing of visit.

5. Visitor Experience

Rated aspects of experience: all sites combined

Figure 10: Q13 "How much do you agree or disagree with each of the following aspects of your visit to this attraction?"



'Not applicable' answers have been excluded and percents re-based

Very high levels of satisfaction

Cadw sites are very highly rated in many ways, especially the friendliness of the staff and the cleanliness of the sites. The very high ratings are consistent across all visitor types and timing of visit.

"It really just blew me away"
Couple, New Zealand, Tintern

"I've waited a long time to come here and this is absolutely perfect"
Couple, South East England, Tintern

"I notice something different every time I come"
Group of friends, South East Wales, Raglan

Rated aspects of experience: ratings by site

If answers are converted to a 5-point rating scale ('strongly agree' = 5, 'agree' = 4 etc), the following table shows how the different sites compare on each aspect:

Table 5: Aspects of each site on 5-point scale

Site	Overall	Value for money	Friendliness of staff	Cleanliness	Suitability for children	Site info available beforehand	Safety
Beaumaris	4.7²	4.6	4.9	4.9	4.8	4.4	4.6
Caernarfon	5.0	4.9¹	5.0	5.0	4.7	4.8¹	4.7
Castell Coch	4.9	4.7	5.0	4.9	4.6	4.8¹	4.8
Chepstow	4.9	4.6	5.0	4.9	4.8	4.3²	4.6
Conwy	4.8	4.7	4.9	4.8	4.7	4.5	4.6
Harlech	4.9	4.7	4.9	4.9	4.4²	4.7	4.6
Raglan	4.9	4.5	4.9	5.0	4.9	4.5	4.7
Tintern	4.9	4.6	4.9	5.0	4.8	4.5	4.9
Overall	4.9	4.7	4.9	4.9	4.7	4.6	4.7

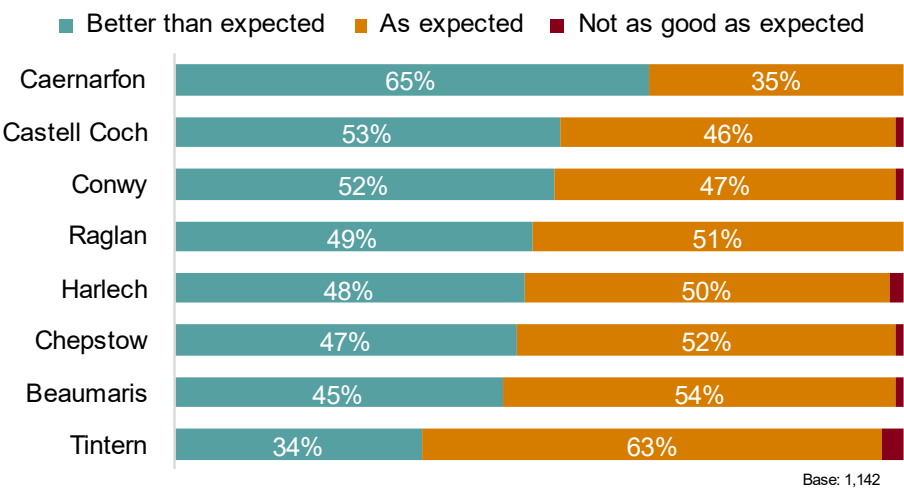
1. Figures shown stand out as particularly above average for that experience aspect.

2. Figures shown stand out as particularly below average.

We explore experiences by site in more detail under Q23 below.

Experiences compared to expectations

Figure 11: Q23 "How does your experience here today compare to your prior expectations?"

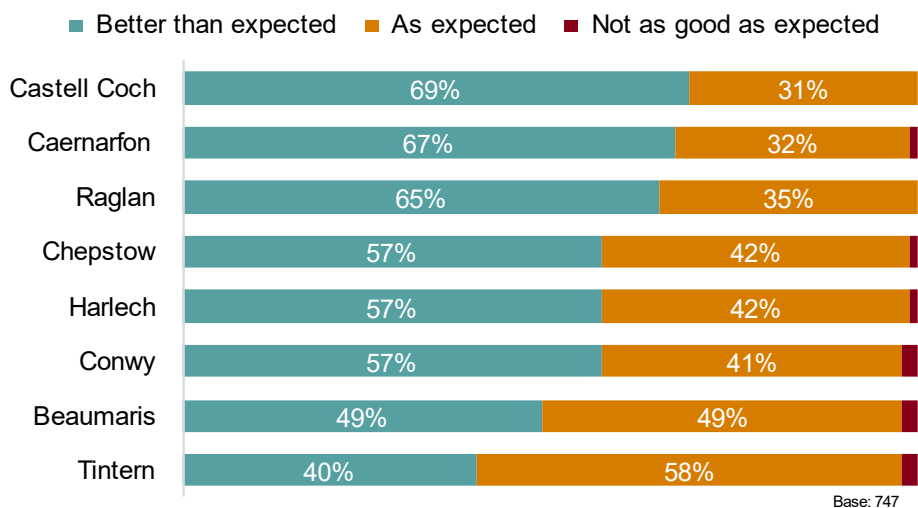


Visits to Cadw sites perform very well compared to prior expectations

Overall, about half (51%) of autumn visitors describe their experience as ‘better than expected’, and nearly all of the remainder (48%) describe it ‘as expected’. Caernarfon stands out as performing particularly well for exceeding expectations.

Answers vary significantly by new / lapsed / repeat visitors. 58% of new visitors and 42% of lapsed visitors have answered ‘better than expected’. This compares to 27% of repeat visitors, who generally know what to expect. Answers do not vary significantly by party type. The chart below shows answers given by new visitors:

Figure 12: Q23 (New visitors) "How does your experience here today compare to your prior expectations?"



Reasons for positive experiences: overall

Firstly we discuss common positive experiences that are generally found across many sites before discussing themes that are specific to one site.

‘I didn’t think it would be this big’

One of the most common reasons for the visit experience exceeding expectations is that the castle or abbey turns out to be much bigger than the visitor expected. In some cases, the expectation comes from looking at pictures, and for castles such as Beaumaris and Chepstow, the true size is deceptive from the outside.

- “I didn't think it was this big after passing on the train”
Group of friends, South East Wales, Chepstow
- “You don't get many pictures on the Cadw website. It's bigger in real life.”
Family with older children, Midlands, Raglan
- “It's bigger than I thought. It's deceptive from the outside.”
Family with young children, North West England, Beaumaris
- “The castle is a lot bigger than I had imagined. The pictures I saw online did not give me a sense of scale.”
Family with older children, USA, Chepstow

More intact / preserved and more open to visitors than expected

Another common reason for visit experiences exceeding expectations is that they didn't realise the castle or abbey would be so intact and well preserved. Some even comment they thought it would 'just be ruins'. Some are also taken by surprise at how much of the site they are allowed access to.

"I thought it would just be ruins"

Lone visitor, North West England, Conwy

"So much more well preserved than expected"

Family with young children, South East Wales, Castell Coch

"Spectacular place. What they built all those years ago: it's amazing to keep it well maintained."

Group of friends, Midlands, Caernarfon

"I didn't expect to go inside and around the top"

Group of friends, North West England, Beaumaris

"You can walk around the top ... couldn't in the past."

Couple, Midlands, Harlech

Climbing up high and enjoying the views

Many visitors really enjoy climbing up the castle towers and walking along the walls. The views from the top of many castles can be spectacular.

"The views from the last tower are absolutely stunning"

Lone visitor, South East England, Chepstow

"The most enjoyable part was the tops of the towers and the stunning views"

Lone visitor, North West England, Conwy

Interpretation brings the site to life

Many comments are made about the interpretation, whether audio, visual, written or decorative. Many visitors enjoy learning about the site's history as they try to imagine how life would have been.

"There's more information than at other attractions we have been to like the Roman Baths and other abbeys in England"

Couple, Yorkshire, Tintern

"The most enjoyable part is visualising it in the medieval times"

Family with older children, North Wales, Conwy

Beaumaris

Enthused by the building blocks

Some visitors to Beaumaris are pleasantly surprised to find there is more to entertain children than expected, especially the castle building blocks. Our recent observational research shows that some dads also enjoy playing with the blocks.

“Entertainment for longer with the blocks”

Family with young children, North Wales, Beaumaris



Castle play blocks and AV space at Beaumaris

Chapel reverb

Some visitors like the reverb they experience in the chapel.

“We enjoyed the chapel reverb the most”

Couple, Midlands, Beaumaris

Caernarfon

Museum

The Caernarfon site contains a museum, and this is the most enjoyable part for some visitors.

“The museum is the best part. Fantastic place.”
Adult family, Yorkshire, Caernarfon

King's Gate roof

Much investment has been made into developing the King's Gate roof, and this is much appreciated.

“We had not been up to the roof before because it was closed, so today was spectacular”
Family with young children, North West England, Caernarfon

“The lift was a pleasant surprise, so being able to come to the top is brilliant”
Couple, Midlands, Caernarfon



King's Gate roof at Caernarfon

Castell Coch

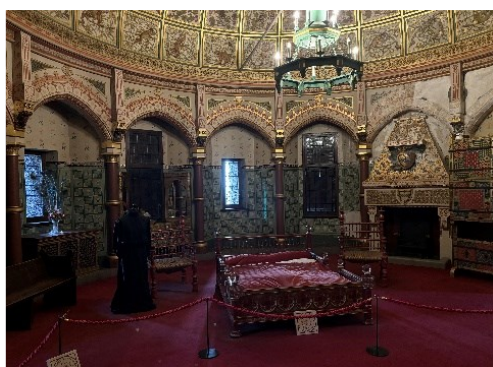
Lovely décor in the rooms

Many visitors to Castell Coch are taken by the décor in the rooms. They like seeing the ornate ceilings, the period furniture and outfits. This all helps them to imagine life for the people who lived there.

“The rooms are fully furnished. Exceptional.”
Couple, South East Wales, Castell Coch

“It’s in a completely different league to what I expected. The paintings and glass windows are stunning.”
Couple, South West Wales, Castell Coch

“The drawing room takes your breath away”
Couple, South East England, Castell Coch



Lade Bute's bedroom at Castell Coch



Fairytale from the outside

We discussed earlier that Castell Coch stands out as an ‘iconic’ place to visit compared to other castles. The ‘fairytale’ appearance from the outside is the main reason. There is currently scaffolding around one of the towers but some visitors like the artwork surrounding the scaffolding.

“We’ve never seen anything like this before. The only thing that reminds me of this is a palace in Spain but there’s nothing else like this in the UK”
Group of friends, South East England, Castell Coch

“It looks like a fairytale castle”
Couple, South West England, Castell Coch

Chepstow

Effort has been made for children

Visitors to Chepstow recognise that Cadw has invested in the experience for children by providing a trail with games. There are comments that the site has been improved since previous visits.

“Activities for children. You can see they've made a real effort.”
Couple, South West England, Chepstow

“The best part was the children's activities. Didn't have these last time.”
Family with young children, South West England, Chepstow



Part of the children's quest at Chepstow

Conwy

As with other sites

Positive comments about Conwy are consistent with other sites, i.e. some visitors are surprised to find it is bigger and more intact than expected. They enjoy accessing all parts and admiring the views when up high.

“It’s a whole castle!”

Couple, Yorkshire, Conwy

“Well preserved walls. Amazing experience to walk the walls.”

Family with young children, East of England, Conwy



East Barbican at Conwy Castle

Harlech

Some unique features

Visitors to Harlech enjoy the accessible bridge and the children’s playground. It is also one of not many Cadw sites to have a café, and this adds to the experience for many.

“Site improvements have made it much better. Love the new bridge.”

Group of family and friends, South East Wales, Harlech

“The playground for children is an added bonus”

Family with young children, South West Wales, Harlech



Café and bridge at Harlech

Raglan

Children's trails

Raglan has made an effort to appeal to children. The Halloween ghost trail in particular has been popular.

"The ghost trail was brilliant"

Family with younger and older children, South East Wales, Raglan



Gatehouse viewed from the entrance to Raglan

Tintern

Improved interpretation

There is much recent investment in interpretation at Tintern, which previous visitor surveys showed to be lacking.

“The information boards are really helpful in explaining the masonry bits”
Lone visitor, South East England, Tintern



Visitor exhibition space at Tintern

Least enjoyable aspects of the visit: general

Firstly we discuss common disappointments that are generally found across many sites before discussing themes that are specific to one site.

Some still want more interpretation

Not many visitors are disappointed by their experience to Cadw sites. If they are, then one of the reasons not specific to any particular site is that they wanted more detailed information about the site, how people lived and what it might have looked like at the time. Some say they would have liked to see a model of the intact castle. This is a feature which some sites currently have.

“I was expecting a little bit more signage and information, a bit more like Caernarfon Castle”

Family with young children, North West England, Harlech

“More general information to bring the castle to life”

Group of family and friends, Midlands, Chepstow

Getting up and down narrow winding staircases

Whilst many visitors enjoy being up high and admiring the views, the flip side of this experience for some is getting up there in the first place. Some feel that more adequate (sturdy) handrails are needed rather than a rope. Caernarfon has a recent lift installation but this was out of action during most of the research fieldwork.

“The worst aspect was the inaccessibility for older and disabled people”
Organised group, South West England, Chepstow

“The steps are precarious”
Family with young children, North West England, Harlech

Beaumaris

More signage

The recent observational research for Cadw showed that visitors go in many different directions upon entry. Some say they would like clearer guidance.

“It needs a ‘start here’ sign”
Adult family, North Wales, Beaumaris

Caernarfon

More lighting needed in some rooms

Whilst visitors appreciate they are in a castle, some would feel happier to have better lighting in some of the rooms.

“The lighting is not so good in some rooms”
Lone visitor, China, Caernarfon

Castell Coch

Accessibility

Some feel that Castell Coch cannot be enjoyed adequately by the disabled because most parts require climbing up or down steps. Some would also like better lighting in places such as the steps going down to the basement for safety reasons.

“Safety here is the least enjoyable aspect, especially in the basement. Understandably it needs to be dark but the floor is also uneven. One of the children fell and cut her nose.”

Family with young children, London, Castell Coch

"If you're disabled, it's not a place for you"

Group of family and friends, Midlands, Castell Coch

Chepstow

No toilet

Chepstow Castle has no toilet on site. The nearest one is across the other side of the car park, but getting back into the castle after using it involves walking up a fairly steep hill.

"There's no toilet on site"

Family with young children, South East Wales, Chepstow

Needs more information aimed at adults

Whilst the improvement in interpretation for children is appreciated, some adults now say there needs to be more for them.

"The information boards are aimed at small children and lack detail. They're not informative enough for adults."

Lone visitor, South East Wales, Chepstow

Conwy and Harlech

As with other sites

Suggested improvements at Conwy and Harlech are as with other sites in general, that more information and better accessibility would be appreciated.

"There's not enough information on the boards"

Group of friends, North West England, Conwy

Raglan

There's no café

Most Cadw sites do not have a café, but Raglan stands out as a site which would greatly benefit from one as the site is quite isolated.

"It might perhaps be nice to have a little more on site alongside the castle along the lines of a café or flowers for sale etc like National Trust sites often have"

Group of friends, South West England, Raglan

Muddy walk to the toilets

Getting to the toilets at Raglan involves walking across grass. At this time of year, the ground may well be muddy, and some visitors do not appreciate getting their shoes dirty.

“The worst part was having to walk across grass to the loo. I hate getting my shoes muddy.”

Couple, South East England, Raglan

Tintern

Construction

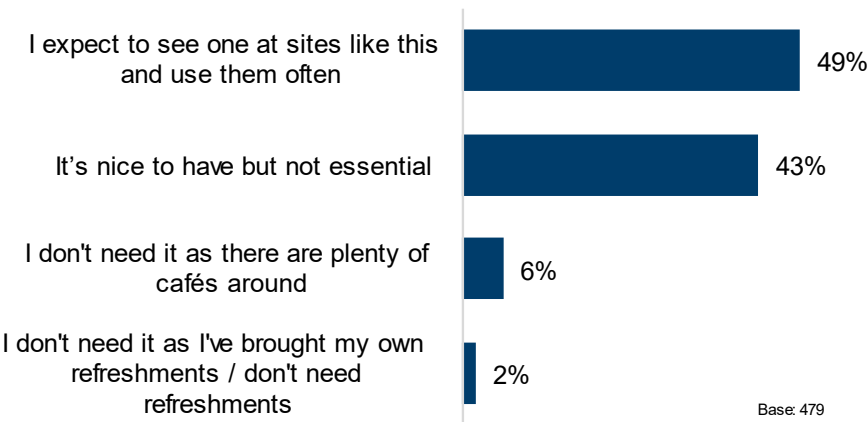
The conservation work at Tintern needs to happen but it takes the shine off the visit for some. We discuss this more later under Q16 & Q22.

“It’s disappointing not being able to see all of the abbey because of construction. We didn’t realise until we got here.”

Family with young children, South West England, Tintern

Onsite café

Figure 13: Q14 (Castell Coch, Caernarfon and Harlech) "How has or will the onsite cafe affect a typical visit to a site like this?"



Q14 has been asked to visitors at Castell Coch, Caernarfon and Harlech

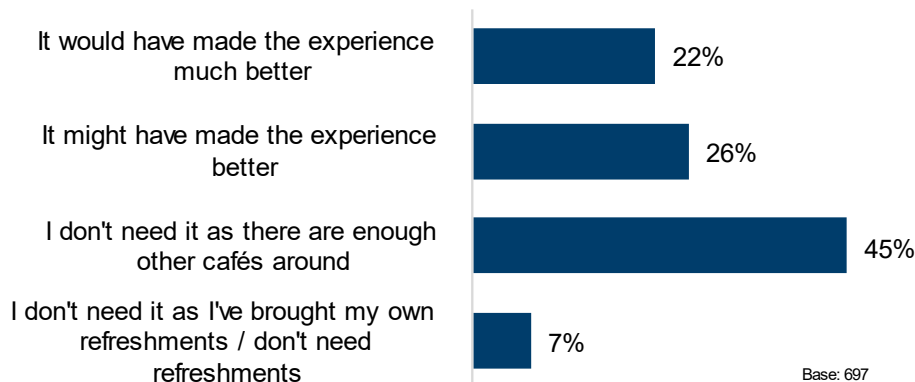
Many come expecting a café

Castell Coch, Caernarfon and Harlech are the three sites in the sample which have a café. About half (49%) of visitors to these sites turn up expecting to see one and use it. This proportion is much higher at Castell Coch (70%) and Harlech (70%) compared to Caernarfon (27%), where many visitors (60%) describe a café as a ‘nice to have’.

Expectations of coming to use a café are higher (52%) among adult-only parties than families with children (41%).

Possibility of a café

Figure 14: Q15 (Castell Coch, Caernarfon and Harlech excluded) "How might an onsite cafe affect a typical visit to a site like this?"



Q15 has been asked to all sites except Castell Coch, Caernarfon and Harlech

Onsite cafés could improve the experience for around half of visitors

At sites without an onsite café, reactions to the prospect of one are split roughly 50/50 between those who feel it could improve the experience and those who don't need it. The strongest calls for a café are at:

- Raglan, (73% say it would/might have made the experience better)
- Chepstow (54%)

Raglan Castle is in the most remote location from urban centres with cafés out of the five sites in question.

"I'm desperate for a coffee as it's quite cold"
Adult family, South West Wales, Raglan

Variation by visitor type

The following visitor types are more likely to feel that an onsite café would/might have improved their experience:

- Weekday term time visitors (58%)
- Wales residents (56%)

Answers do not vary significantly by party type.

Effects of construction on experience

Figure 15: Q16 (Tintern) "How, if at all, has the onsite construction affected your experience today?"



Q16 has been asked to visitors at Tintern

A bit of a shame about the scaffolding, but much understanding shown

The highlight of Tintern Abbey is the church part of the site. Part of it is currently closed whilst scaffolding stands for conservation work.

Some visitors say this has affected their experience, but comments generally show that they understand conservation work needs to be carried out.

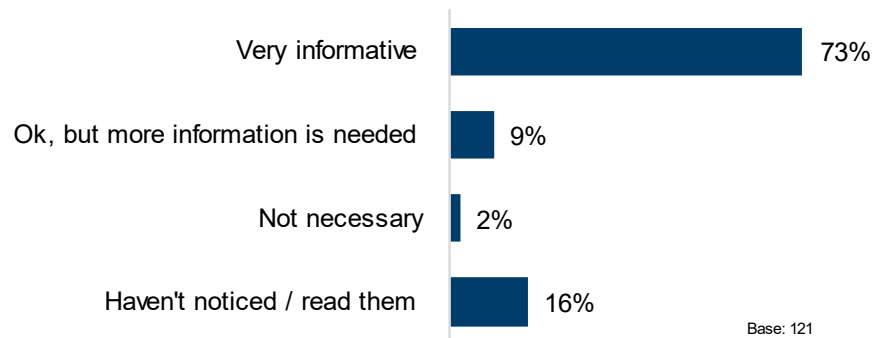
"There's work going on here but I understand it has to get done"
Lone visitor, USA, Tintern



Church area with conservation work and information panels at Tintern

Conservation panels

Figure 16: Q22 (Tintern) "How do you feel about the conservation information panels?"



Base: 121

Q22 has been asked to visitors at Tintern

Very informative information panels

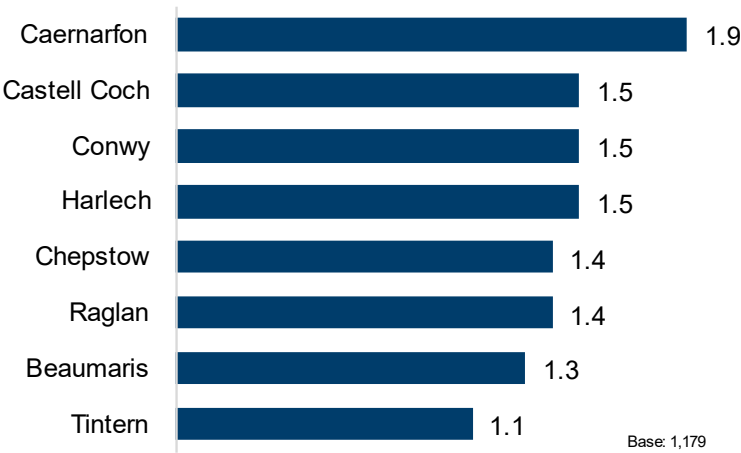
Tintern has two sets of conservation information panels: one set close to a path leading from the site entrance and a second set inside the church. The panels explain the conservation work being undertaken and the reasons. Visitors tend to notice them and find them very informative. It is possible that the presence and quality of the panels softens some of the disappointment.

“I like the information boards and history, plus the conservation information. It is end to end history and future.”
Couple, Midlands, Tintern

Dwell time

Figure 17: Q17 "How long did you spend / do you expect to spend at the castle (or abbey) today?"

Approx. mean time shown in hours



1.5 hours average dwell time

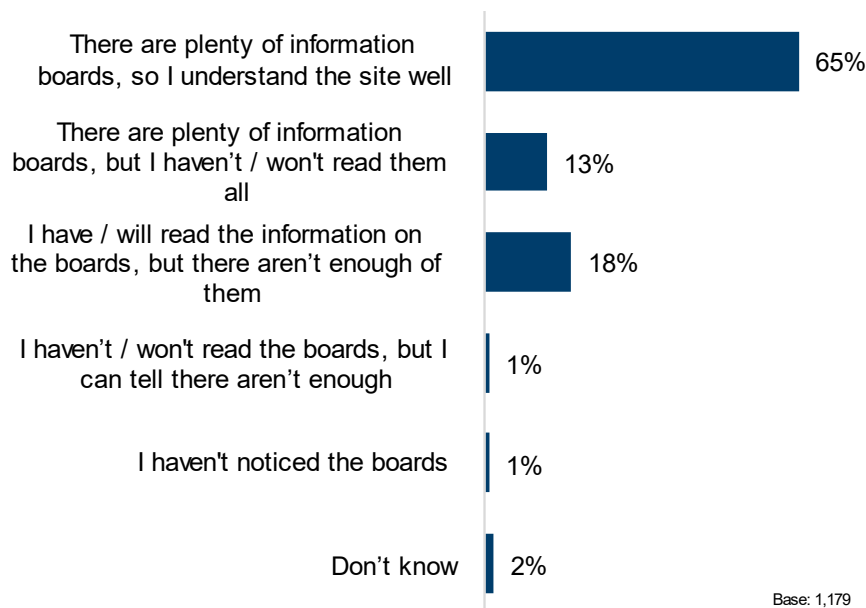
On average, visitors to Cadw sites in the autumn spend or intend to spend 1.5 hours there. This is the same finding as in the 2022 summer survey.

Caernarfon stands out as attracting longer than average dwell times (1.9 hours), whereas visits to Tintern (1.1 hours average) are typically a bit shorter than at other sites.

Results do not vary significantly by timing of visit or party type.

Information boards

Figure 18: Q18 "Thinking about the information panels around the site that help you to understand its history and design, which of the following statements do you agree with most?"



Good level of information overall

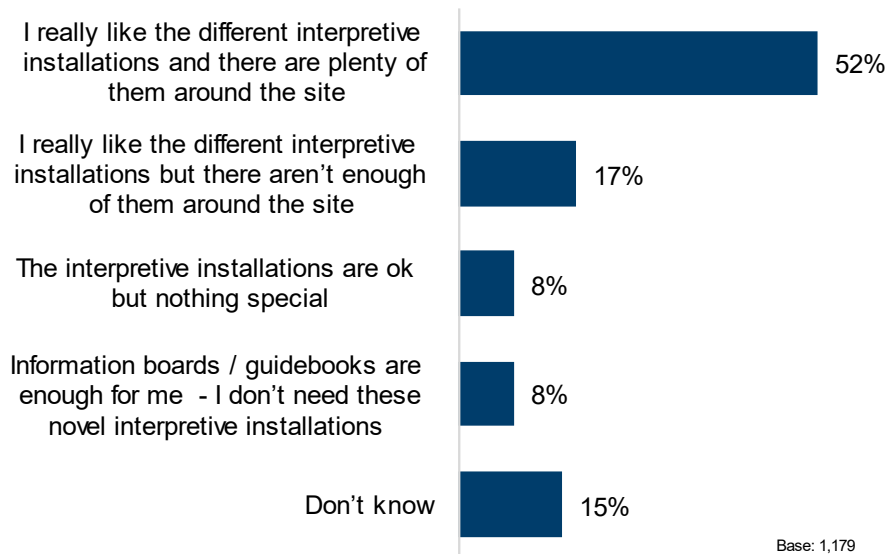
The level of information provided in the form of boards at Cadw sites is generally felt to be sufficient. There is variation by site, although the proportion saying there aren't enough is always in the minority. The proportion answering 'There are plenty of information boards, so I understand the site well' is highest (84%) at Caernarfon.

The proportion answering 'I have / will read the information on the boards, but there aren't enough of them' is fairly consistent by site, but noticeably lower (and therefore visitors are more satisfied with the information) at Caernarfon (4%) and Castell Coch (8%). The availability of audio tours may have influenced the result to this question if visitors feel they already get enough information from that. Chepstow offers audio tours, but these were not always working during the research fieldwork period.

Answers do not vary significantly by party type or timing of visit.

Interpretive installations

Figure 19: Q19 " ... how do you feel about the other ways information is shared at the site or how the site is interpreted?"



Positive feedback

The majority (69%) of visitors say they really like the interpretive installations, with some even saying there should be more.

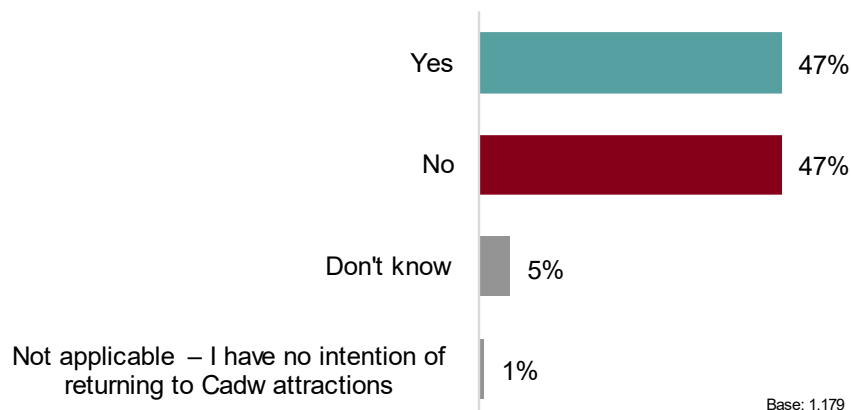
Caernarfon and Castell Coch stand out here. 85% of visitors to Castell Coch and 84% of visitors to Caernarfon say they 'really like the different interpretive installations and there are plenty of them around the site'. This is much higher than at other sites, where installations are appreciated but more would be welcomed.

"The best part was seeing some extra artefacts, the costumes, the tables, the toys, the rooms now express themselves, the maid's costume, the butler's costume, the plates"
Group of friends, South East Wales, Castell Coch

Whilst answers vary significantly by site, they do not vary significantly by party type or timing of visit.

Interest in Cadw app

Figure 20: Q20 "Would you consider downloading an app to your phone to help plan any future visits to Cadw attractions and enhance your experience on site?"



Divided views on a Cadw site app

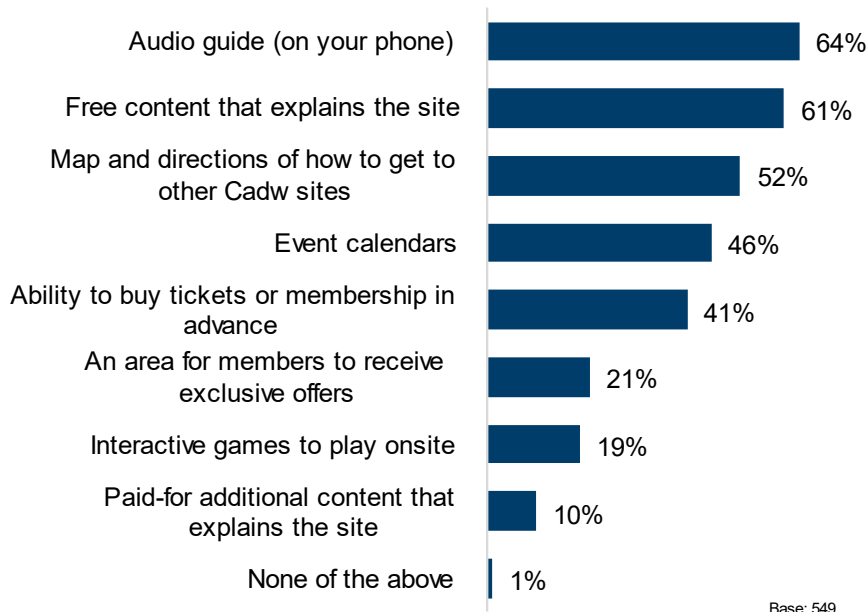
Views on a Cadw site app are split roughly 50/50 between being interested and not being interested. Given the volume of visitors across the sites, it seems that an app would be used by enough visitors to be worthwhile developing.

The highest proportions of visitors expressing an interest are found at/among:

- Harlech (58%)
- Families with children (51%)

Features of Cadw app

Figure 21: Q21 "Which of the below would you be interested in using?"



Base: 549

Q21 has been asked to visitors answering 'yes' to Q20 (interest in the app)

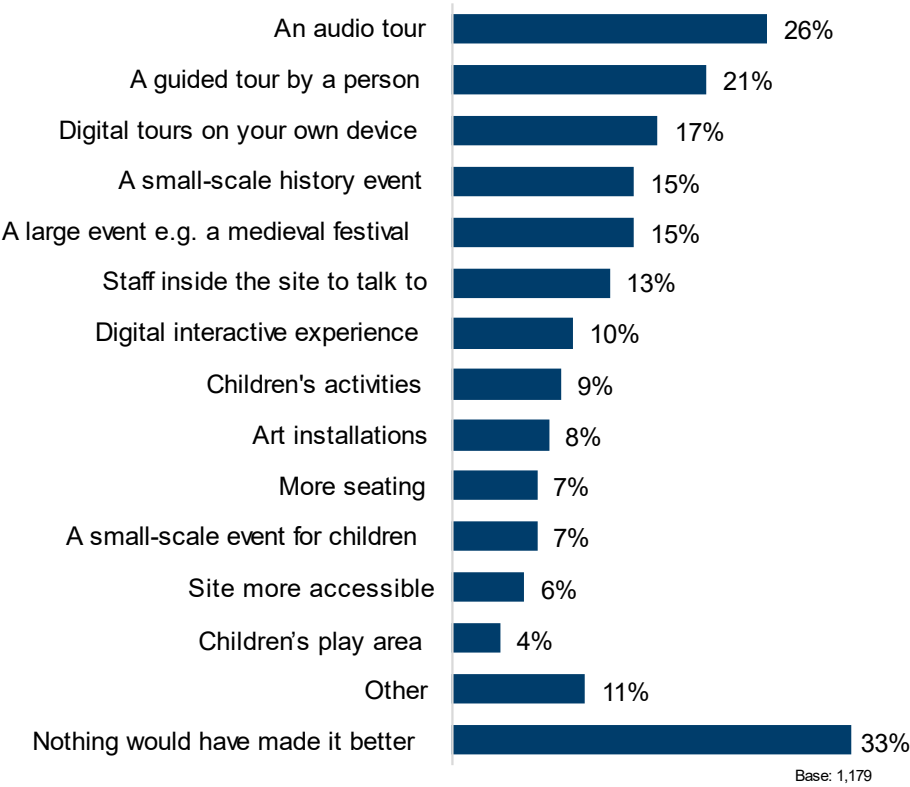
Many potential features of interest

Among those interested in a Cadw site app, there are numerous features which would be used if made available. Audio guides top the list. These are not currently available at some Cadw sites, but this answer is still given by visitors to sites which do provide them.

Answers are fairly consistent across different sites and visitor types. 'Interactive games to play onsite' does not rank highly overall, but this would be considered by 40% of families with young children.

Improving the experience

Figure 22: Q27 "Would any of the below have made your experience to the site better?"



Tours and events top the ideas for improving the experience

There are numerous different ideas for improving the visitor experience at Cadw sites, some of which currently feature at certain sites but not others.

The top three answers above are all related to tours, whether audio or guided by a person. Audio guides stand out as the clear top answer overall if the proportion giving this answer (34%) is isolated to just the sites which do not currently offer them.

Audio guides are well used and appreciated at sites which have them.

“The most enjoyable aspects are the audio guide and the art installations”
Lone visitor, Belgium, Caernarfon

6. Implications for Cadw

Balance between overselling and underselling a site

So many visitors to Cadw sites are pleasantly surprised by what they find: a castle which is bigger, more accessible and more intact than they expected.

In some ways, it is a pleasing result that so many expectations are exceeded and so few visitors go away feeling disappointed. However, if some visitors come not expecting very much or not knowing what to expect, how many potential visitors have the same muted expectations and therefore don't come?

Whilst an attraction experience can be oversold and therefore not live up to expectations, it is also important that the experience is not undersold, resulting in lost potential visitors. More pictures and videos easily found on Google showing things to do at the sites may help.

Many good reasons to visit in the autumn

Whilst tourism to Wales in the autumn is not as high as in the summer, there are still many tourists around looking for places to visit, as are many day trippers. The main motivation for visiting remains interest in castles / historic sites, as is the case in summer.

Some visitors appreciate being able to enjoy a site in peace at this time of year, especially if they visit on a weekday.

Investment in interpretation is noticed

The previous visitor survey in summer 2022 highlighted weaknesses in the interpretation offering, especially at Tintern and Chepstow. Cadw has subsequently invested in more content as a result, and this is appreciated by visitors.

The recent observation research for Cadw has given details on the extent to which written information is read and how much other forms of interpretation are appreciated to inform future investment.

Interest in an app

There is a reasonable degree of interest in a Cadw site app. Developing one could address a number of needs, including the desire for audio tours and more detailed written information about the site.

Café at Raglan?

Cadw continues to weigh up the cost vs benefit and other issues of providing an onsite café. The strongest need seems to be at Raglan due to its more isolated location.